Job Aid 8

Exchange 2000 Migration Planning Checklist

This checklist outlines the steps you should take to plan for the deployment of Exchange 2000 in your enterprise. Keep in mind that this will be a limited deployment, meant primarily to perform server consolidation within an existing Exchange 5.5 organization.

Exchange 2000 Migration Planning Checklist: Further Details

This checklist will provide guidelines for the parts of your infrastructure you will need to review when you build your Exchange 2000 project plan. It will help you through planning your Exchange 2000 server installation order, both at a site level and a server level.

What you will need

- A complete diagram of your current Exchange architecture
- A complete diagram of your current Windows 2000 architecture
- A complete diagram of your current physical network

Determine Office Strategies

List your offices and their types in the following table. Expand the table as necessary for additional offices. Valid office types are Global Headquarters (GHQ), Regional Branch Office (RBO), Large Branch Office (LBO), Medium Branch Office (MBO), and Small Branch Office (SBO). Note: SBOs should have no Exchange servers.

Office Name	Office Location	Office Type	# Exchange Servers

For each office listed in the previous table, you will need to determine whether you have any Exchange 2000 plans. These plans include upgrading current servers, installing new servers, migrating resources (mailboxes, public folders, or connectors, and which connectors) to Exchange 2000 servers. List these in the following table.

Office Name	Explain Exchange 2000 Plans

Determine Exchange Site Strategies

List your current Exchange sites here.

Site Name	Geographic Description	Number and Roles of Exchange Servers

Once you have listed your sites, determine what plans you have for Exchange 2000 in each of them. This may map directly to your office plans from the previous section if each office is its own site.

Site Name	Explain Exchange 2000 Plans

Having outlined your Exchange 2000 plans for each site, you will now build a sequence for these actions. If you have no plans for Exchange 2000 in any specific site, you may leave that site out of this table.

Sequence	Site Name
1	
2	
3	

Determine Exchange Server Plans

For each server in your organization, determine if it will be upgraded, if it will have its resources migrated to another system, or if it will be left alone. Remember that some Exchange 5.5 connectors are not available in Exchange 2000 in this process.

Server Name	Server Type	Exchange 2000 Plans

From the servers listed in the above table as **upgrade** or **migrate**, you need to determine sequencing. List all servers in these classes below and their sequence. Ensure that this sequence aligns with your sequencing in your site sequencing table.

Sequence	Server Name	Exchange 2000 Plans
1		
2		

3		

Determine Project Plan Dates

Once you have your Exchange 2000 server sequence determined, you can build a project plan for implementing these actions. You will want to use a tool such as Microsoft Project for this.

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